

DRAFT CHAPTER

Copying to be unique? – An analysis of high street retailers' product differentiation strategies*Susanne Schulz***Abstract**

Based on empirical data from twenty semi-structured interviews with designers, buyers and merchandisers of UK based multiple womenswear retailers, this chapter examines the variations in retailers' working practices with a particular emphasis on their product differentiation strategies. The theme running throughout this chapter is that of differentiation and similarity – a topic of enquiry commonly associated with Simmel's ([1904], 1957) essay on fashion. This discussion of the womenswear retailing industry demonstrates that, more than one hundred years after Simmel published his work, the dualistic tendencies of similarity and differentiation continue to fuel the modern fashion system.

Keywords

Fashion retailing – Simmel – imitation – differentiation – UK fashion industry – fashion design

1 Introduction

Traditional sociological studies of fashion, such as Simmel (1957) for example, argue that fashion satisfies central human needs of differentiation, competition and stratification on the one hand, and the equally essential desire for expressing uniformity, conformity and belongingness on the other. Indeed, for Simmel imitation and differentiation are the oxymoronic principles that guide all human conduct (Finkelstein, 1991) and that are present on both the individual and societal level (Simmel, 1957). Simmel accords great significance to the interplay between them and argues that these forces can never be satisfactorily united in one single institution, law or the like, because "...the former (imitation) represents the idea of generalisation, of uniformity, of inactive similarity of the forms and contents of life; the latter stands for motion, for differentiation of separate elements, producing the restless changing of an individual life." In order to reach an approximation to the

ideal constant changes are necessary. An expression of this can be found in the rapidly moving cycle of fashion which is fuelled by fashion's unprecedented urge for presentness and newness. "...Fashion dogmatically rejects the Fashion which preceded it, its own past; every new Fashion is a refusal to inherit, a subversion against the oppression of the preceding fashion; Fashion experiences itself as a Right, the natural right of the present over the past..." (Barthes, 1983:273).

As fashion is the antithesis of continuity and solidity only being engulfed in the flux of it can confer a sense of security and group solidarity onto its ardent followers. Indeed, imitation intensifies existing social bonds as it is a careful and calculated act which presupposes the identification of the contents of a particular fashion, as well as the acknowledgement of an approved fashion elite which one sets out to imitate. By imitating others, the individual transfers their own responsibility to a certain extent onto them, while at the same time being able to experience a feeling of relative security and belongingness for they have become part of a larger group. "Imitation... gives to the individual the satisfaction of not standing alone in his actions... the individual is freed from the worry of choosing and appears simply as a creature of the group, as a vessel of the social contents." (Simmel, 1957: 542-543). Spencer (1898) differentiated between "referential" and "competitive" fashion imitation, with the latter form of imitation fuelling the adoption fashion in modern societies. Spencer argued that competitive imitation springs from the motive to assert equality with those perceived as superior and this claim of equality is being made by quickly adopting the latest fashions in order to be classed among the elite.

Fashion cannot exist in seclusion but needs a stage for public display where the roles of performers and spectators are constantly reversed. Fashion needs to be seen - it has to gain approval, which is an essential prerequisite for any form of differentiation (König, 1973). Fashion can function as a barrier to exclude and separate groups by setting standards that are only attainable by some. This makes fashionable individuals conspicuousness, because they are part of a larger privileged elite which adhere to the same standards. "...Distinction, if it is to function effectively by making conspicuous... must be associated with something that is accepted by the community as a distinctive feature. Every distinction must therefore also be... accepted by the rest of the community... distinction from and forming part of a social group do not rule each other out." (König, 1973: 112-113). The individual hence deviates from some norms but thereby conforms to others: they stand out without standing on their own

because they have the approval of the larger social group. Having the support of one's group is essential in Simmel's account, it determines an individual's behaviour. The individual is carried by a feeling of solidarity which enables her/him to deviate in a way that is approved of and that erases feelings of shame or embarrassment (Simmel; 1904:553).

2 The importance of being different: Life-style retailing & branding

While people's desire to achieve social distinction through clothing is as old as fashion itself, the concept of life-style consumption only properly emerged in the 1980s and was echoed on the retailing side in the "retailing revolution", which saw the rise of the new retailing concept of "life-style" or "niche marketing" (du Gay, 1996). The term "market niche" refers to the relationship between consumption patterns and consumers' age, income, occupation, lifestyle, etc. (Braham, 1997). An important step in the realisation of niche marketing was retailers' novel use of own-brands. While retailers previously used own-brands as a way of communicating their price consciousness, retailers began to use own-brands as a means to add value to their products – this repositioning of own-brands in retailing significantly challenged the established manufacture–retailer power relationship (Moore, 1995).

Life-style marketing encompasses more than the tailoring of products to a specifically defined customer group; it includes the overall shopping experience – store image, visual displays, music, sales staff, etc. (DeNora and Belcher, 2000). By offering the complete "image package" retailers encourage consumers to transform themselves into the consumer "types" on offer in store. In addition, window displays can persuade or dissuade potential customers from entering the store. Thus, retailers can employ semiotic strategies to filter customers (DeNora and Belcher, 2000). This observation is shared by Crewe and Lowe (1996) who argue that clothing retailers' particular differentiation strategies are related to the "demographics and lifestyle perception" of their target customer group. Retailers who cater for a young market, for example, will build their retailing concept around a strong image and brand name, while retailers who are targeting an older market may do so with "understated, quality classics" (Crewe and Lowe, 1996: 277).

Indeed, today's customers desire distinctiveness. Murray (1989: 44, 49) for instance, has argued that consumption is no longer emulative but has come to resemble a striving for distinction. This point is also made by Bourdieu (1984), who looked at

the interrelationship of economic and cultural capital, which he used as markers for mapping “tastes and preferences which correspond to educational level and social class, in short ... a model of class life-styles” (Jenkins, 1992: 138, original emphasis). According to Bourdieu, people who share a similar class of conditions of existence are united by taste, while at the same time their standard of taste distinguishes them from those with different experiences/ background. In his analysis of the field of fashion production and consumption, Bourdieu (1975) shows that the fashion industry satisfies consumers’ need for social distinction on both a synchronic level and diachronic level, by fulfilling consumer’s desires in any given season with garments that differ from season to season.

Having outlined the importance of branding and lifestyle retailing on a general level, it is now time to turn to the data in order to look at interviewees’ descriptions of how their companies strive to survive in the market. In order to do this, we will first look at how retailers can be grouped into design-led and buying-led companies depending on their internal organisational structure and working practices.

3 Design-led and buying-led retailers

The sample was divided into participants’ occupational group (eg. designer, buyer or merchandiser) and the organisational type of company they are working. Companies were divided into design-led buying-led companies; the labels attached to each company follow respondents’ own explicit or implicit definition. The preface “design-led” and “buying-led” points to organisational differences between companies and is testimony to the varying levels of influence these two occupational groups exert in the shaping of a company’s range of clothing (Schulz, 2008). This can be clarified by looking at some concrete examples. In companies that have been categorized as “design-led” it is the designers who are most influential in determining the characteristics of the product range, while buyers and merchandisers are less involved in this process. In Tanya and Eric/Tim’s companies, for instance, although the design teams merely consist of two designers each, the balance of power is biased in favour of the designers and all or at least the great majority of these companies’ garment ranges are designed in-house.

Sarah: ... 100% of the range is done by four designers and that goes through from coats, bags, shoes – we do everything.
(Designer, design-led retailer)

Kate, on the other hand, is the only designer in her company. Even though she supplies some of the design ideas, the bulk of the range is based on “bought in” designs, i.e. manufacturers’ sample garments, chosen by the buyers. Moreover, Kate’s position vis-à-vis the companies’ buyers is not very strong and subsequently her company has been classified as buying-led.

Kate: When I was a student, I always thought the designers had the say ... they sort of control it all ... but actually it’s quite different. It’s the buyers!

(Designer/Trend Co-ordinator, buying-led retailer)

Indeed, the most significant difference between retailers lies in the percentage of in-house designs that are used to make up a collection. Designers in design-led companies create most of the range in-house, while garment ranges of buying-led companies are predominantly “bought in”, i.e. built from buying samples that buyers collect from suppliers and during shopping trips. Thus, while design-led companies value designing ranges from scratch, buying-led companies’ range building is centred around the adaptation of buying samples that are picked from a multitude of sources. The differences in methods can be highlighted in the following quotes from Sophia and Kim:

Sophia: ... we do a lot of sketching ... I start with a blank piece of paper, whereas some people tend to start with a bunch of garments and they kind of piece them together. [...] I went straight from college to Italy, where you do design very much ... the first few years in my career I didn’t see people’s garments to copy. You get to have to create everything. And I think it probably has made quite a difference ... a lot of people ... build a mock range and they do variations ...

(Designer, design-led retailer)

Researcher: How do you put the range together?

Kim: ... I see a lot of suppliers, I will have been round all the stores and I see what’s happening and it’s very much, you know “That’s good from that supplier and that’s good from that supplier. We haven’t seen any of this or we’ll ask them to make this for us.” You

know, basically you just pick bits, and bits that are missing you kind of put in yourself [or] ... you ask them to make it for you or you send them a sample of something you want them to make for you.

(Product Developer/Buyer, buying-led retailer)

Thus, the pre-fix “design-led” has been applied to retailers who largely rely on their own in-house design teams to create the style and brand image of the company, while the description “buying-led” indicates that it is the buyers’ selection of products that establishes the companies’ looks. It is therefore the combination of (i) the percentage of the range that is designed in-house and (ii) the power relationships between designers and buyers, that determines the organisational set-up of a company and its classification into design-led or buying-led.

Design- and buying-led companies can be further differentiated with regards to the consumer age groups they cater for and the market price level they are positioned at. For example, buying-led companies cater for customers in the 15–30 age bracket and are positioned at the middle-cheap end of the market, whereas the age span of design-led retailers’ customer ranges from 20–70+ years with a mid-higher market position. Following this categorisation into design-led and buying-led companies, the sample consists of 7 design-led and 9 buying-led companies with 9 and 11 respondents per group respectively.

4 Differentiation & Fashionability

Retailers’ relative position on the fashion/non-fashion continuum can be assessed in relation to their overall fashion forwardness, which has an impact on the company’s set up and working practices. Fashion has traditionally been associated with class distinction (Simmel, 1957; Veblen, 1908, Bourdieu, 1984) and the impact of “prestige personalities” (König, 1973) as fashion leaders and trend setters. Indeed, designers have become modern-day “priests and philosophers of our culture” (Jacobs and Kalman, 1993) and the data suggest that the work of elite designers still serves as a yardstick for fashionability against which interviewees assess their companies’ and their customers’ level of fashion forwardness¹.

Interviewees primarily measured the level of fashionability of their company with reference to top designers, i.e. how quickly and to what extent a company or consumers follow catwalk trends. In the case of respondents from buying-led

companies reference was also made to other prestige personalities (musicians and other celebrities) and occasionally with reference to a specific high street competitor. It is interesting to note that even interviewees whose companies do not follow these trendsetters, they were nonetheless used as points of reference for assessing their companies' fashionability. This is reminiscent of Baudrillard who, according to Tseëlon (1994: 129), pointed out that "even resistance to fashion is still defined within the order of fashion". Rita, for example, a fabric buyer for a design-led retailer, argues that her company is not very fashion forward because "catching those trends ... isn't important to us or our customer". While, Spohia points out that being too fashion forward has adverse effects for a company:

Sophia: ... we have made a few mistakes on fashionability, where we thought as a label we could go fashionable and it hasn't worked ... the brand is too established ... on that nice level that the fashionable person doesn't want.

(Designer, design-led retailer)

On the other hand, Faye points out the influence of top designers on her buying-led company while Alicia clearly acknowledges that her company is perceived by other buying-led retailers as a fashion leader:

Faye: ... we spend a lot of time looking at Versace and Gucci ... when the catwalks head down ... those are the kind of looks that we take our inspiration from...

(Design Manager, buying-led retailer)

Alicia: ... a lot of people see us as quite high fashion ... [as having] it in the shop not much after the catwalks have been on.

(Buyer, buying-led retailer)

Similarly, though not a manufacturer of high-fashion clothing, Clara maintains that her company has very successfully used inspiration from top designers within their own clothing ranges:

Carla: ... [catwalk fashion] is hard to decipher or take down to our level [...] [but] Stella McCartney ... whatever she does... we are still

doing versions of that...

(Designer, buying-led manufacturer)

Retailers' degree of fashion forwardness not only influences when, or indeed whether or not, a company follows the fashion lead set by prestige personalities, but also has an impact on (1) the split of retailers' ranges, and (2) the in-shop lives of their garments. The companies in the sample break down the fashion cycle of garments into three different stages. This is illustrated in the following quote by Vivian:

Vivian: If you look at the life cycle of it [fashion] ... you can break [it] into ... trend, ... newness ... [or] contemporary and then you've got kind of core, which is just like high volume stuff.

(Design Executive, buying-led manufacturer)

Following Vivian's definition "trend" refers to garments with a high fashion content, while garments of a moderate level of fashionability are described as "newness" or "contemporary". Clothes of a minimal or no degree of fashionability are characterised as "core" garments. This category of clothing is also often called "basic" or "standardised". Not all companies use the same terminology to describe these different degrees of fashionability. In Sophia's company, for example, garments are divided into special (fashion), interest (newness) and basic (core).

Sophia: We do our basic range, we do our range that has a bit more interest, so you put a little bit more newness in and then we do what is our proposal for special, the special end.

(Designer, design-led retailer)

Despite these differences in labelling, Sophia and Vivian's division of garments and garment ranges according to their level of fashionability is remarkably similar. Looking at the overall distribution between fashion, contemporary and core garments, it becomes clear that the extent of companies' fashion forwardness determines the mix of their product range. However, whilst all companies in the sample grade their ranges similarly and interviewees share the same points of reference in terms of assessing their companies' fashion level, when looking at the garments in store it becomes clear that what is rated as fashion within one company's range may merely be classified as newness in another's. The overall degree of a company's

fashionability, as opposed to outside standards of fashion, appears to act as the point of reference in the internal grading of garments and clothing ranges. This means, for example, that a company with a moderate degree of fashionability may classify a garment as “fashion” even if it captures a trend that has first appeared on the catwalks more than a year ago. On the other hand, a more fashion forward company may label a garment as “core” which less ardent followers as fashion may perceive as “newness”.

Also of significance when comparing companies’ levels of fashionability are the differences in their “seasonal lead-times”. Seasonal lead-time refers to the time between the initial trend forecasting and the arrival of garments in the shops. The data show that seasonal lead-times vary significantly between design-led retailers and buying-led retailers. On average, the design-led retailers in the sample start planning their ranges just over one year ahead of the season, which means that the initial forecasting and design stages are even further in advance; whereas the lead-times for buying-led retailers range from 5 months to 4 weeks. The differences between design- and buying-led companies’ lead-times and the connection between lead-time and retailer’s degree of fashionability can be clearly seen in the following two quotes:

Rita: ... we are kind of working, one year to 2 years ahead. But for us, because we aren’t an overly fashionable company, ... we can work that far in advance, you know, it’s not like we are picking up what’s in stores, what the designers are showing, although our colours ... we use colour palettes that are presented as being on trend for those seasons, the fabrications and styling isn’t going to be, you know, fashion led as such. So ... yes we do work very much in advance ...
(Fabric Buyer, design-led retailer)

Alicia: ... a lot of people see us as quite high fashion ... [as having] it in the shop not much after the catwalks have been on.
(Buyer, buying/design-led retailer)

Lisa: ... quite often we’ve seen things on the catwalks and we’ve had them in like the next three weeks. Our quickest lead-time is two weeks ...
(Assistant Buyer, buying-led retailer)

These examples clearly show the connection between a company's level of fashionability and their working practices. Thus, Rita argues that her design-led company does not follow fashion other than in terms of colour and that they can consequently work much further ahead of season than, for instance, Kate's company which targets a younger, more fashion forward market.

There are also significant internal variations in lead-times between different departments and product types. This explains the great variation in lead-times from months to weeks found within buying-led retailers. Alicia explains this as follows:

Alicia: ... different departments have different lead-times. Generally we start, sort of about 6 months before ... just looking at where we think it's going. But my department [jersey] itself can turn stuff round in 4 to 5 weeks. So we can work very quickly ... but knitwear, for example, have already booked the whole season so ... the design teams run on two kinds of speed, one for us which is really quick and now and the other one where they sort of look quite far in advance.
(Buyer, buying-led retailer)

Knitwear and tailoring are generally placed the furthest in advance not only because they are less likely to be subject to quick fashion changes but also because the more complex designs, sophisticated cuts or finishings make these garments more labour intensive and hence placing them with offshore instead of local suppliers will keep costs down. It follows that through these practices design-led retailers' lead-times are not only much longer than those of buying-led retailers, but it is also more difficult for them to repeat garments from within their own range or to react to emerging trends, as Tanya and Tim point out.

Researcher: Can you repeat garments that sell really well?

Tanya: It depends. Obviously when we place fabric, if there is something we feel very strongly and we think "I know this is going to be really good", we place additional fabric and therefore if that's in place the sort of turn around for manufacture is 6 to 8 weeks ... However, if we haven't got the fabric, that does prove harder for us

because we then have to go back to the mills and see if they've got anything left to be made up. So it's really only on styles that we have cloth available.

(UK Merchandise Controller/Buyer, design-led retailer)

Tim: We can't do a great deal of it [repeat orders], because a lot of our goods are actually quite heavily hand worked and so the lead-times are too long basically. That's why our range tends to be quite broad, we don't actually do a great deal quantity-wise per style, but we make it up by putting more in, by more frequently changing things.

(Buying Director, design-led retailer)

We have thus established that there are variations between design- and buying-led companies in terms of their overall level of fashionability and that this has consequences for their working practices. The next section examines the relationship between a company's fashion level and their product differentiation strategy.

5 It's Difficult to Be Different: The Quest For New Ideas From Similar Sources Of Inspiration

The importance of offering consumers something different that allows them to assemble "a lifestyle (or lifestyles) through personalised acts of choice in a world of goods and services" (du Gay, 1996: 100) is keenly felt amongst industry practitioners. However, despite the realisation of the importance of a strong brand that provides customers with a distinctive product range, interviewees' commented on the fact that many mid-market womenswear retailers offer very similar ranges of clothing.

Sean: I think a lot of people want to elevate themselves away from the high street. They want that difference, they don't want to look the same as all their friends ... I think ... personally, that the middle market is saturated, there are too many different retailers in there and I think some of them will get wiped out.

(Assistant Merchandiser, buying -led retailer)

This criticism of the high street is echoed by Faye, a designer for a large buying-led company, who maintains that “everybody is just chasing the same end and ... the differentiation between different brands is hardly noticeable”. Indeed, though almost written two decades ago, Robinson’s (1999: 20) claim that “many retailers remain merely sellers of brands without their own distinctive handwriting” still appears to hold true.

As mentioned in Sean’s quote above, the lack of differentiation is particularly evident amongst mid-market retailers – a segment of the market dominated by buying-led retailers. Indeed, when looking at the sources of inspiration that this group of retailers draws on can see a close overlap between companies not only in terms of what sources are rated as particularly important, but also in terms of how information is actually procured. Thus, the main sources of inspiration for this group of retailers are forecasting agencies (for catwalk trends and colour predictions), fabric shows, and other UK womenswear retailers.

All but two of the buying-led companies used the same forecasting agency, in four cases this provider was used exclusively for trend and colour information, while only one of the design-led companies subscribes to this service. Indeed, of the design-led companies who use dedicated forecasting services all employ a different one, while three companies do not employ any outside forecasters.

All interviewees stated that they attended Premier Vision, which is the key fabric show for the industry. Fabric shows provide the starting point of the forecasting process for buying-led retailers, while for design-led retailers *Première Vision* “is sort of at the end” of the forecasting cycle (Leah) since most retailers within this group obtain their initial sources of inspiration for fabrics and colours directly from mills which, of course, start developing new products well in advance of the first fabric shows. In view of the long lead-times of design-led companies, it is not surprising that they should take advantage of the earliest opportunity for seeing new products by visiting fabric mills. This gives them the opportunity of starting their forecasting and planning cycle at least two months ahead of *Première Vision* and other fabric shows.

Sarah: ... we tend to start the new season by going to Italy and we go to Milan and we’ll do the shops. Then we’ll go to Como, Lake Como

where the majority of our print mills are based and this will be maybe two months before *Première Vision*, which is the fabric show in Paris, and at that stage they are all getting prepared for the PV shows, but they, being in that business have all the forecasting books and ... you know, there are ... the Italian Council for Silk and, you know, they've got a lot of information at their fingertips very, very early in the season. Whereas we would have, if we didn't go there, we would have to wait for our fabric forecasting books to come through and the shows, basically. But we tend to get all that information about 6 to 8 weeks before it's possible to get them from any other source really. And from that we tend, if we go around say 8 mills, we tend to know when we come back which are the predominant colours that everyone is going for.

(Designer, design-led retailer)

While the data suggest that the design-led retailers in the sample find fabric shows useful for finalising and consolidating their decisions, fabric shows may be less useful for buying-led companies or, at least, for certain departments within this group of companies. Alicia, for example, points out that for her jersey department fabric shows are only helpful in terms of colour selections, whereas "other departments get lots out of it".

Interviewees across the sample also mentioned going on directional (trend) buying trips to many of the same North American and European cities. While retailers use buying trips abroad for inspiration, UK-based shopping trips have a different significance for retailers, depending on whether they are design-led or buying-led. Although all interviewees stated that they visit the competition to do comparative shopping, i.e. to gage their own price level against that of their competitor, interviewees from buying-led companies openly admitted using the competition for directional (trend) shopping too, i.e. with a view to buying garments in order to rework or copy them. This is an important factor when it comes to assessing the variations in companies' differentiation strategies and will therefore be discussed in detail in sections 6 and 7.

6 Designed to be unique: Design-led retailers' pursuit of difference

In order to clarify the divergent differentiation strategies employed by design-led and buying-led retailers, we need to closely look at retailers' use of UK based competitors as sources of inspiration as it is here that design-led retailers' differentiation strategy becomes most obvious. The data suggest that, because design-led retailers are less concerned with following the latest trends they seek to establish their own specific market niche by developing a unique style.

Eric: It's unique... "designed to be individual" ... it's our corporate phrase ...when you buy a [garment from us] it really is individual and original and that's where our strength lies...

(Senior Merchandiser, design-led retailer)

This emphasis on developing one's own stylistic handwriting is at odds with the method of directional shopping because any real individuality in style cannot be achieved by copying or reworking buying samples. It is thus not surprising to find that design-led retailers tend to look at their competitors for price comparison rather than inspiration. This can be clearly seen in Tim and Leah's statements below. Interestingly, Leah argues that at times it is difficult to lay claim to an idea as original, since high street retailers share similar sources of inspiration and hence fairly similar ideas may be picked up by more than one company. Exposure to similar stimuli and the fact that retailers do not exist in a vacuum, i.e. they need to look at their competitors so that they do not lose touch with the market, mean that a certain amount of interchange of ideas is inevitable. However, like Tim, Leah is very clear about the fact that her company does not intentionally go around to competitors' shops to copy ideas for their own use.

Researcher: Do you look at your competitors at all?

Tim: Competitors, yes of course, it depends in which context you take it ... we don't look at our competitors to extract ideas, it's more to actually make sure that we are competitive within the same competitive set ...

(Buying Director, design-led retailer)

Leah: I think we are constantly aware of what other people are doing ... because they are competition so you need to constantly check. I think that we try very much not to copy, well everyone does, I mean

it's very difficult to know where the idea came from in the first place sometimes, because it's gone round and round the houses, [but] I wouldn't say that we would go into any of our competitors and pick something up and say "Oh, yeah that's nice – let's do a version of it."

(Buying Director, design-led retailer)

There is a strong rejection of the practice of "copying others" and interviewees' own emphasis on uniqueness, which transpires in the above quotes. Although a certain cross-fertilisation of ideas is undoubtedly inevitable since everyone in the fashion industry is exposed to similar stimuli, all interviewees who work for design-led retailers rejected the idea of copying others, even though Francis, who works for the youngest and most fashion-forward of the seven design-led retailers, concedes that if everybody else is following a certain trend, her company should get on board. However, she also stresses that:

Francis: [This company] ... is slightly different to the high street. We won't go out necessarily and copy what's in the stores. I mean it basically comes from design ideas ... from, you know, [our own] designers themselves.

(Buyer, design-led retailer)

While Francis realises the importance of following general trends for her company, she makes a clear distinction between the copying of garments from others and her design colleagues' interpretation of trends. Here, we see again the interplay of the dualistic and paradoxical forces of uniformity and differentiation that Simmel (1957) saw at the very heart of fashion: on the one hand, design-led retailers strive for uniqueness yet, on the other hand, they recognise the need to follow broad trends and to adhere to the currents within the larger fashion system as it is this system which defines what fashion is so to produce fashionable garments is not possible without reference to the trends set by the system. Nonetheless, design-led retailers' emphasis lies on differentiation and one can now understand why this group of retailers tend to design their entire range, or at least a large percentage of it, from "scratch" in-house and why designers hold greater power vis-à-vis buyers than they do in buying-led companies. This organisational set-up allows design-led companies to achieve greater exclusivity by only minimally relying on suppliers for design ideas; this practice also

makes it easier for them to develop their own stylistic handwriting and a more coherent brand image.

7 Copying to be unique? - The tragedy of (pseudo-)differentiation

While the previous section has shown that uniqueness is the over-riding differentiation strategy for design-led retailers, this section explores how buying-led retailers seek to differentiate themselves by intentional and speedy adaptation of fashion trends set by top designers and fashion forward competitors. In contrast to design-led retailers who intentionally divert from or lack behind fashion trends to achieve a level of uniqueness, buying-led companies seek distinction through the fast and accurate production of copies. Baudrillard (1998) points out the inherent paradoxical nature of differentiation through re-production by stating that in:

...the industrial production of differences... differences are all arrayed hierarchically on an indefinite scale and converge in models, on the basis of which they are subtly produced and reproduced. As a result, to differentiate oneself is precisely to affiliate to a model, to label oneself by reference to an abstract model, to a combinatorial pattern of fashion, and therefore to relinquish any real difference... This is the miracle and the tragedy of differentiation. ...instead of marking a person out as someone singular, they mark rather his conformity with a code, his integration into a sliding scale of values.

(Baudrillard, 1998: 88-89, original emphasis)

Indeed, the importance to quickly conform to a “new code”, as Baudrillard (1998) put it, is epitomised in the quote below:

Kate: ... the high street, very young high street fashion, works very close to the season. So we don't plan so far ahead ... we see things and 4 weeks later they will be in the shop ... very, very quick ... we lift a new trend we immediately go and get something like that sampled and put it in the shops. So we respond very quickly ... [...] this end of the market, is very much a case of getting the thing in first [...] It is a bit of a rat race, it is a bit [like] “Who is going to be first?” (Designer/trend co-ordinator, buying-led retailer)

Faye: ... most of the work we do is based ... straight off the catwalks ... we're so close to the season it's totally catwalk driven.
(Design Manager, buying/design-led retailer)

Carla: ... Stella McCartney ... whatever she does, ... we are still doing versions of ... that.
(Designer, buying-led manufacturer)

While the above statements are clear testimony of the link between differentiation and affiliation to a model as theorised by Baudrillard, none of the respondents reflected on the implications of this kind of pseudo-differentiation, i.e. the fact that straight conformity with the fashion code encourages product sameness. It is exactly the self-referential nature of fashion (Esposito, 2011), i.e. fashion as endlessly reproduced from models, that Baudrillard (1993, 1998) critiqued. This is also echoed by Finkelstein (1991) who argues that following fashion can only ever confer a false sense of uniqueness onto its followers as adhering to fashion integrates the individual into the fashion system thus making them more common, conventional and easier to interpret. Fashionability, Finkelstein states, is no solution to the problem of identity and individuality, but is rather an expression of the modern individual's feeble sense of identity and of the degradation of identity in contemporary society². While Baudrillard and Finkelstein's comments relate to fashion consumers, they are also applicable to the producers as fashion as the following quotes from respondents testify:

Interestingly, this point is addressed by some of the design-led interviewees in their criticism of buying-led retailers' practice of copying others:

Sophia: ...some ...are very much like "Oh, this is the sweater to have – copy it!" And that mentality to me is: what's the point! Because everybody else is going to be copying it...
(Designer, design-led retailer)

Sarah: You can go to Oasis and buy a black pair of trousers and you've got identical ones in Warehouse and then you go to Top Shop and there's a more or less identical pair in there ... you've got three

shops where you can get exactly the same pair of trousers ... it's a bit pointless! ... I think it's lost its individuality, the cheaper end of the market.

(Designer, design-led retailer)

Sophia and Sarah's statements not only highlight their belief that it is important for retailers to develop their unique style in order to distinguish themselves from other retailers, but they also allude to the inherent problem of product sameness found among high street retailers who seek to copy rather than design unique garments. Moreover, by employing speed rather than uniqueness as their overriding competitive strategy buying-led retailers opening themselves up to heightened competitive pressure as continuous innovation cannot establishing customer loyalty and continuity of sales in the same way as strong branding can (Lau and Lee, 1999). However, in the absence of a unique style "speed to market" can help to reduce demand uncertainty as the ability to buy closer to the season, once trends have been determined from the information gathered throughout the forecasting/inspirational stages, can reduce the risk of missing fashion trends or selecting the "wrong" garments (Schulz, 2015).

8 Conclusion

What has become clear throughout this chapter is that fashion companies oscillate between the poles of sameness and differentiation, which gives rise both to greater security and increased competition. The findings thus bear a resemblance to Simmel's (1957) interpretation of the function of fashion in society, which he describes as a paradoxical force that creates a sense of uniformity and differentiation at one and the same time. Like Simmel's followers of fashion who negotiate their dualistic need for belongingness and individuality through their choice of clothing, the companies in the sample are torn between their need to conform to the standards of the fashion system, i.e. by drawing on similar sources of inspiration, and the necessity to employ differentiation tactics, either through a uniqueness of style or quick response to new trends, in order to strengthen their competitive position in the market. A company's differentiation strategy depends on which tendency is stronger: imitation or differentiation. While design-led companies attempt to be unique in their product offering and style, buying-led companies endeavour to be faster than the competition in adopting the latest trends.

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¹ Individuals display varying degrees of the desire to be different from others depending on the reference group that they compare themselves to. Brenninkmeyer (1963) believes that, in general, innovators of fashion have a greater need for differentiation, while fashion followers have a more pronounced need for similarity. According to Snyder (1980:33) a moderate level of similarity generates the highest level of acceptability on the "uniqueness identity dimension"; the level decreases in relation to the decrease or increase of an individual's perceived similarity relative to others.

² These observations stand in contrast to Simmel's assertion that fashion confers a heightened sense of individuality onto its followers. Though Simmel does not reflect to what extent this may be a kind of pseudo-individuality he nonetheless makes a distinction

between those who gain social distinction through their “calling or profession” and others who are denied access to this source of individuation and power. “In a certain sense fashion gives woman a compensation for her lack of position in a class based on calling or profession. ...Fashion ...supplements a person’s lack of importance... by enabling him to join a set characterised and singled out in the public consciousness by fashion alone. ...The personality as such is reduced to a general formula, yet this formula itself, from a social standpoint, possesses an individual tinge and thus makes up through the social way what is denied to the personality in a purely individual way.” (Simmel, 1957: 551-552)